



SEA TURTLE NESTING HABITAT PUBLIC EDUCATION CAMPAIGN



Task 1 – Target Audiences

Prepared for the Florida
Department of Environmental
Protection and the Florida
Fish and Wildlife
Conservation Commission



Photo Credit: iStockphoto

SACHSMEDIA
G R O U P



TABLE OF CONTENTS

› EXECUTIVE SUMMARY	2
› PROCESS & METHODS	6
› POPULATION	8
› DEMOGRAPHICS	10
› ECONOMY	14
› TOURISM & RECREATION	16
› GEOGRAPHY	20
› REGULATIONS	22
› DATA SOURCES	24
› APPENDIX: RAW DATA	26



EXECUTIVE SUMMARY

> ***Why a campaign on sea turtle protection?***

Loggerhead sea turtles are one of those exotic, mysterious marine species that help define the Florida mindset and fuel the imaginations of children and adults alike. No less importantly, sea turtles perform ecologically critical tasks, such as consuming sea grass to maintain foraging and development habitats for myriad marine species and bringing much-needed nutrients to beaches and dunes. Without a healthy sea turtle population, human reliance on seafood – and the numerous industries sustained by fish and crustaceans – would be substantially diminished. Beach and dune wildlife would also suffer, resulting in further harm to humans and our habitats.



Photo Credit: iStockphoto



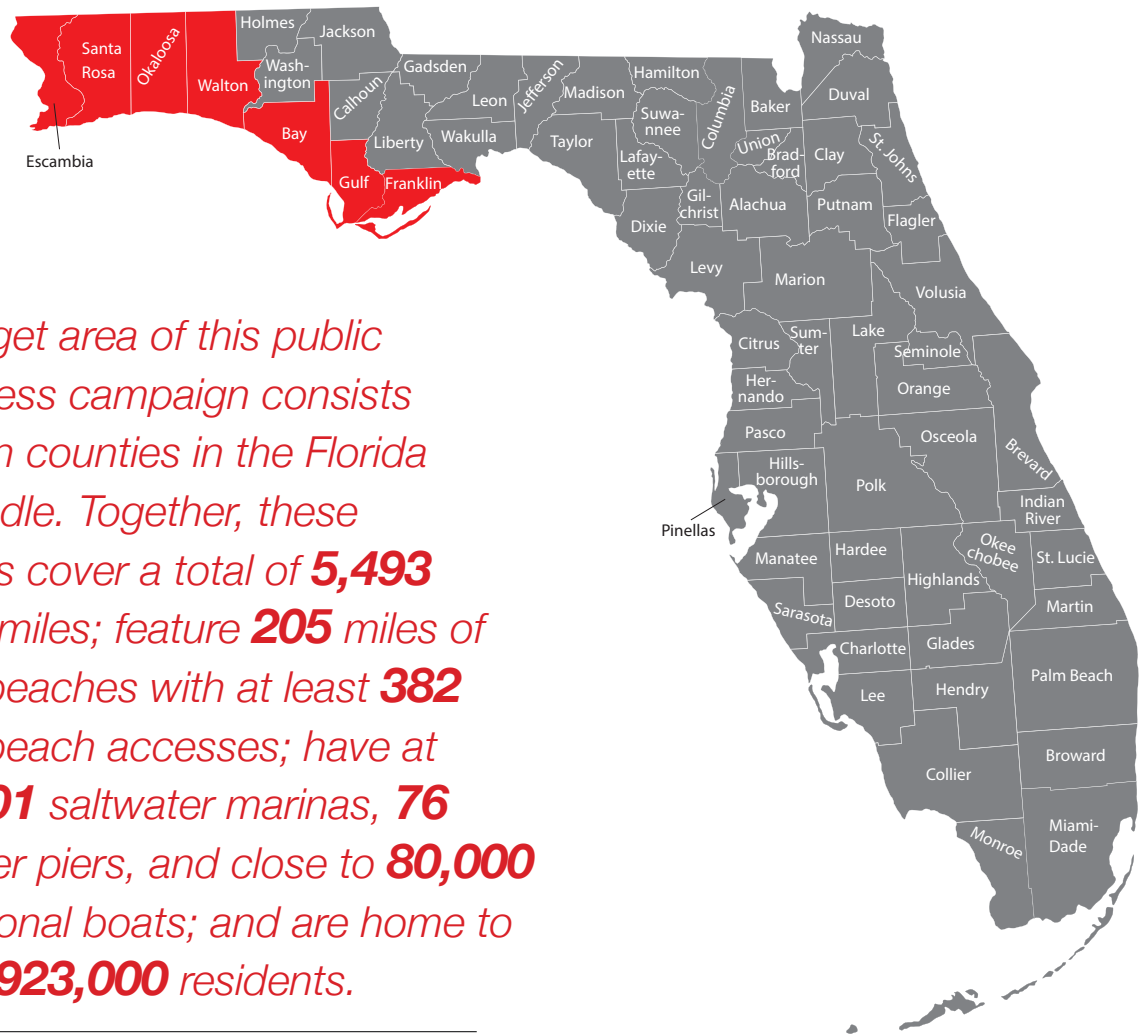
Photo Credit: iStockphoto

Yet public understanding of the broad impacts of loggerhead sea turtles on marine and human affairs, and of our key role as stewards of sea turtle habitats, is grossly lacking. Indeed, many of the threats to sea turtles posed by human behavior are incidental, unintended and avoidable, deriving from activities that people fail to recognize as inherently hazardous to sea turtles.



EXECUTIVE SUMMARY

› *Reaching target audiences: A unique challenge in the Panhandle*



*The target area of this public awareness campaign consists of seven counties in the Florida Panhandle. Together, these counties cover a total of **5,493** square miles; feature **205** miles of sandy beaches with at least **382** public beach accesses; have at least **101** saltwater marinas, **76** saltwater piers, and close to **80,000** recreational boats; and are home to almost **923,000** residents.*

This campaign seeks to broaden the reach of communication activities designed to enhance awareness of sea turtle stewardship and preservation behaviors among Panhandle residents, businesses, visitors and tourists.

Panhandle beaches attract a wide range of tourists who have little to no understanding of issues regarding sea turtles and have limited investment in preserving Florida's environment. In some areas of Florida, large

numbers of visitors stay in resorts and other sizeable establishments that can serve as effective partners in sharing local messages about environmental stewardship. In contrast, Panhandle visitors frequently stay in free-standing vacation rental homes; many of these guests never meet the property owners in person and may have little contact with other full-time residents during their stay. These characteristics provide unique challenges in disseminating information.



EXECUTIVE SUMMARY

➤ **Primarily, this public awareness campaign will focus on:**

- Turtle-safe beachfront lighting
- Nightly removal of beach furniture
- Proper disposal of beach garbage
- Reduction of recreational marine debris
- Avoidance of incidental catch of sea turtles
- Promoting sea turtle-safe beaches

Understanding the various activities that disrupt or threaten sea turtles provides a starting point for identifying target groups. For example, messages about the avoidance of incidental catch would be important for recreational anglers but would be unnecessary for beach visitors who do not fish.

The following table depicts primary target groups associated with each campaign focus:

Turtle-safe beachfront lighting including the practice of closing blinds and using turtle-safe lights	<ul style="list-style-type: none"> • Residents and visitors in beachfront and nearby properties • Night anglers • Visitors with beach bonfires • Beachfront and nearby businesses
Nightly removal of beach furniture including chairs, tents, rental equipment and more	<ul style="list-style-type: none"> • Beachfront vendors such as those who rent chairs, umbrellas, jet skis, Hobie Cats and other sail boats • Residents and visitors in beachfront properties • Hotel and condo management and staff
Proper disposal of beach garbage	<ul style="list-style-type: none"> • Beachfront vendors • Residents and visitors in beachfront properties • Hotel and condo managers • Day visitors
Reduction of recreational marine debris including fishing line, nets and hooks	<ul style="list-style-type: none"> • Pier and shoreline anglers • Day visitors • Bait and tackle shop management and staff
Avoidance of incidental catch of sea turtles	<ul style="list-style-type: none"> • Pier and shoreline anglers • Bait and tackle shop management and staff
Promoting turtle-safe beaches including the closing of holes that are dug in the sand, better grooming practices and the limiting of beach driving	<ul style="list-style-type: none"> • Day visitors • Residents and visitors in beachfront and nearby properties • Municipal staff



EXECUTIVE SUMMARY

➤ *Through this exercise, a few broad target groups emerge:*

1. Beachfront property managers
2. Beachfront vendors & business managers
3. Overnight visitors who rent beachfront properties
4. Day visitors
5. Recreational anglers
6. Full-time beach-area residents

The demographic characteristics of these six target groups differ from one another. A close look at regional demographic, tourism and housing characteristics provide some guidance on the most common “personas” that represent each of these five target groups.

➤ **Six most common “personas”**

The intent of defining the most common, or “modal,” personas is not to suggest that these identities capture all of the campaign’s audiences, but rather to paint a picture of “who” a target group is, in order to provide a sharpened focus for the awareness initiative.

BEACHFRONT PROPERTY MANAGERS



A 45-year-old female property manager for vacation rental properties whose owners live out of the county or state

BEACHFRONT VENDORS & BUSINESS MANAGERS



A 35-year-old male or female resident who lives inland but works on the coast

OVERNIGHT VISITORS



A four-member family on summer vacation, staying on or near the beach in a rental home

DAY VISITORS



A group of 21-year-old friends living within driving distance who come to the beach at least a few times per year

RECREATIONAL ANGLERS



A 50-year-old father and 18-year-old son who live nearby and visit the beach frequently

FULL-TIME BEACH-AREA RESIDENTS



A 55-year-old married couple with no children in the home, living in their owned home



PROCESS & METHODS



Photo Credit: iStockphoto

Demographic and socioeconomic data are most accessible for large geographic regions – states, Congressional districts or counties. Fewer data are collected or reported for smaller geographic regions, such as cities, towns or individual zip codes. Yet for many public awareness campaigns, it is critical to understand the social landscape of these smaller spaces in order to craft messages and strategies that will be most effective within local communities.

In developing this public awareness campaign, we have focused first on the residents of coastal zip codes, who constitute a small portion (approximately 15 percent) of the total seven-county population. These individuals are not only the most likely to regularly impact beach and turtle nesting environments, but they are also likely to encounter newcomers to the area and are therefore highly valuable conveyors of best stewardship practices.

A comparison of coastal zip code populations to larger county populations reveals some meaningful demographic differences. Specifically, those living in coastal zip codes are generally older, less ethnically diverse and have fewer children living in the home than county residents at large. Further, on average, coastal zip codes have far higher rental vacancy rates than their home counties, along with lower owner occupancy rates.

A greater assortment of broad data were available at the county level for the seven target counties, including information on employment, tourism, recreational activities and income. In analyzing these data, where relevant, we looked for meaningful differences between target counties and the State of Florida as a whole.



PROCESS & METHODS

Our methodology in identifying target audiences considered both hard data gathered from Census and other sources, and information gleaned from select interviews. While hard data provides a clear snapshot of who lives in target coastal and county areas, far less is known about overnight visitors.

We know that day visitors to the beach from surrounding counties are, on average, younger, more diverse and less affluent than those who own or live in coastal zip codes. Specifically, the median age for target county residents is 40.5 while the median age for coastal zip code residents is 44.8. In terms of diversity, 12.8 percent of county residents identify as black, compared with just 5.5 percent of coastal zip code residents.

Other personas, however, are based at least in part on anecdote and supposition. For example, we assume that beachfront vendors and staff are overall younger than landlords or property managers. Indeed, according to U.S. Bureau of Labor Statistics for 2013, the median age for property managers is 50.8 years. Comparatively, the median age for rental clerks is 44.1. While these data do not necessarily represent target county demographics, they do provide guidance on what we can expect to be the case.

Further, regarding our target audience of recreational anglers, it is understood that these activities are enjoyed by coastal residents of all ages. According to the U.S. Fish & Wildlife Service, Florida anglers are well distributed between age groups. Specifically, about 7 percent of Florida anglers are between the ages of 18 and 24; 17 percent are between the ages of 25 and 34; 23 percent are between the ages of 35 to 44; 21 percent are between the ages of 45 to 54; and 28 percent are ages 55 and older. Once again, while we cannot be certain that Panhandle anglers mirror these statewide findings, these data provide a starting point in defining this target audience.

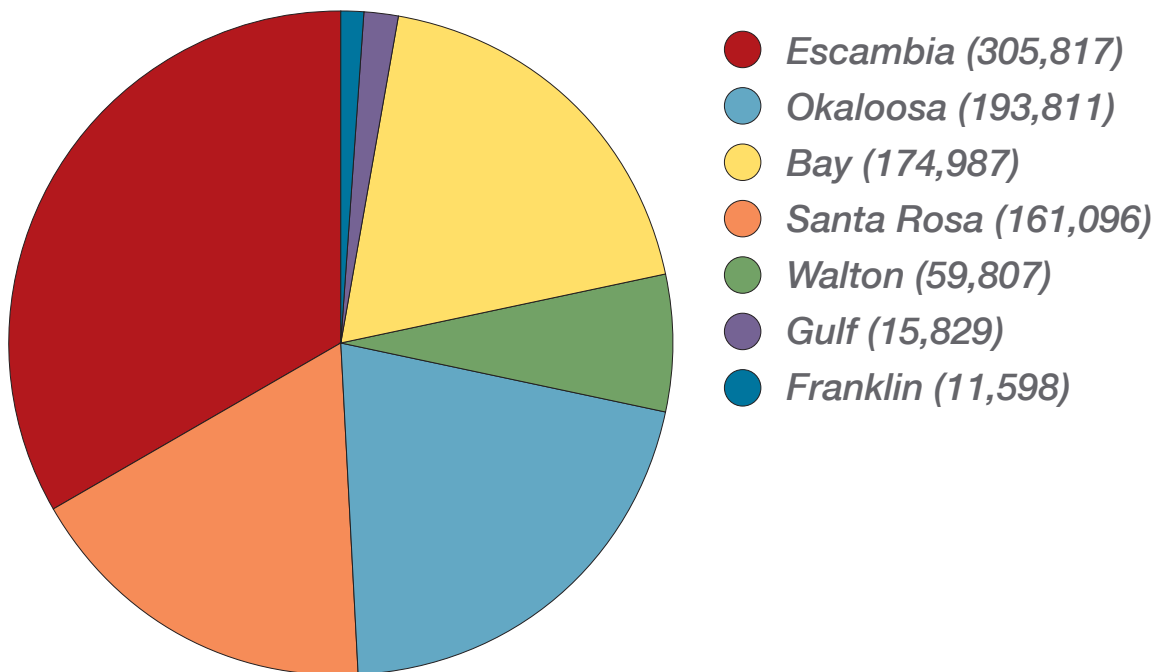
The data tables and narratives that follow provide links between what is known about county and coastal demographics, and educated guesses at “who” will receive campaign messages.



POPULATION

The seven target Florida Panhandle counties in this campaign are home to a total of almost 923,000 residents (based on 2013 Census figures), representing about 5 percent of Florida's total population. Among these, the populations of Escambia (305,817), Okaloosa (193,811), Bay (174,987), and Santa Rosa (161,096) counties are the largest, followed in order by Walton (59,807), Gulf (15,829) and Franklin (11,598) counties.

TARGET COUNTY POPULATIONS IN 2013

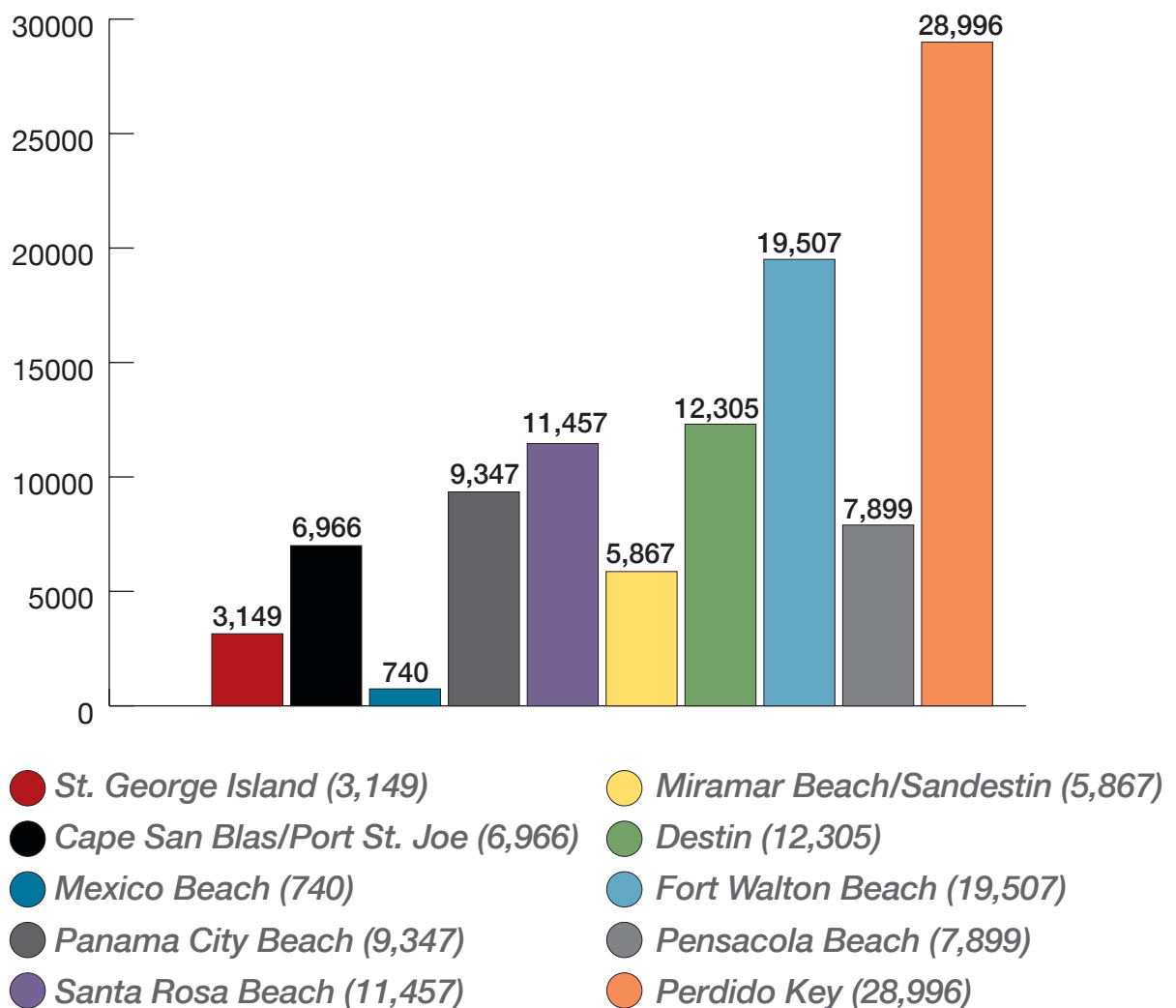




POPULATION

Within these counties, the populations of individual coastal zip codes are of course far smaller. The seven-county area includes a total of 10 coastal zip codes, including: 32328 (St. George Island), 32456 (Cape San Blas/Port St. Joe), 32410 (Mexico Beach), 32407 (Panama City Beach), 32459 (Santa Rosa Beach), 32550 (Miramar Beach/Sandestin), 32541 (Destin), 32548 (Fort Walton Beach), 32561 (Pensacola Beach) and 32507 (Perdido Key). Together, these zip codes are home to 127,045 residents (per 2010 Census data). Among these zip codes, Perdido Key and Fort Walton Beach have the most full-time residents, with populations of 28,996 and 19,507 respectively.

POPULATION OF COASTAL ZIP CODE AREAS WITHIN TARGET COUNTIES IN 2010





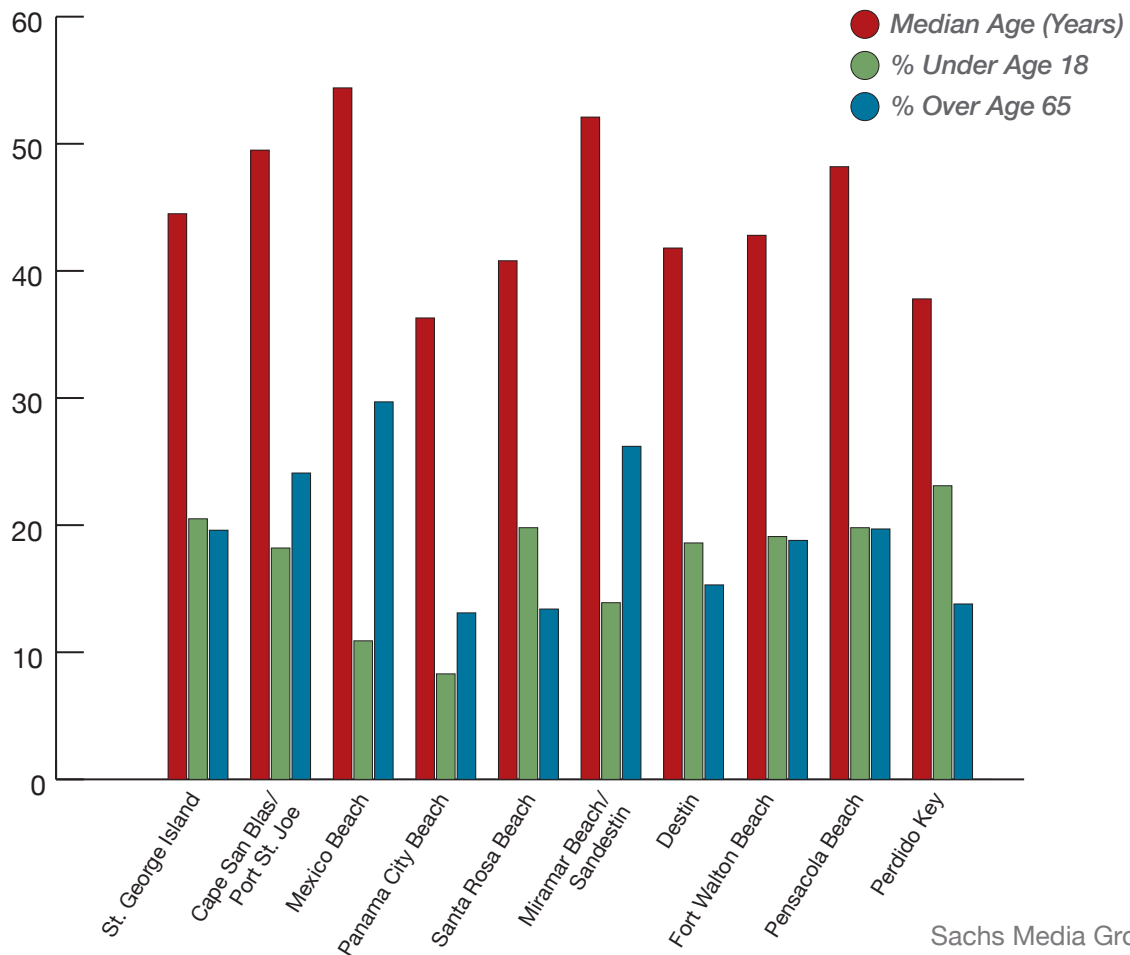
DEMOGRAPHICS

> **Demographic characteristics of 10 coastal zip codes and their seven home counties**

The following demographic analysis focuses first on the residents of coastal zip codes, and provides comparisons between these populations and those within their larger target counties. Wherever possible, the focus of this analysis concentrates on characteristics of coastal areas. However, far more data is available for their seven home counties.

Overall, residents of the 10 target coastal areas are older and less ethnically diverse than the populations of their home counties. The median age within these coastal zip codes is 44.8 years, compared with 40.5 years in the home counties. Similarly, residents younger than 18 constitute 17.2 percent of coastal zip code populations, compared with 20 percent in the target counties; and residents older than 65 represent 19.4 percent of coastal populations, compared with 16.5 percent of county populations. In other words, the coastal areas of the target counties are home to 14 percent fewer minors but 18 percent more seniors.

AGE CHARACTERISTICS





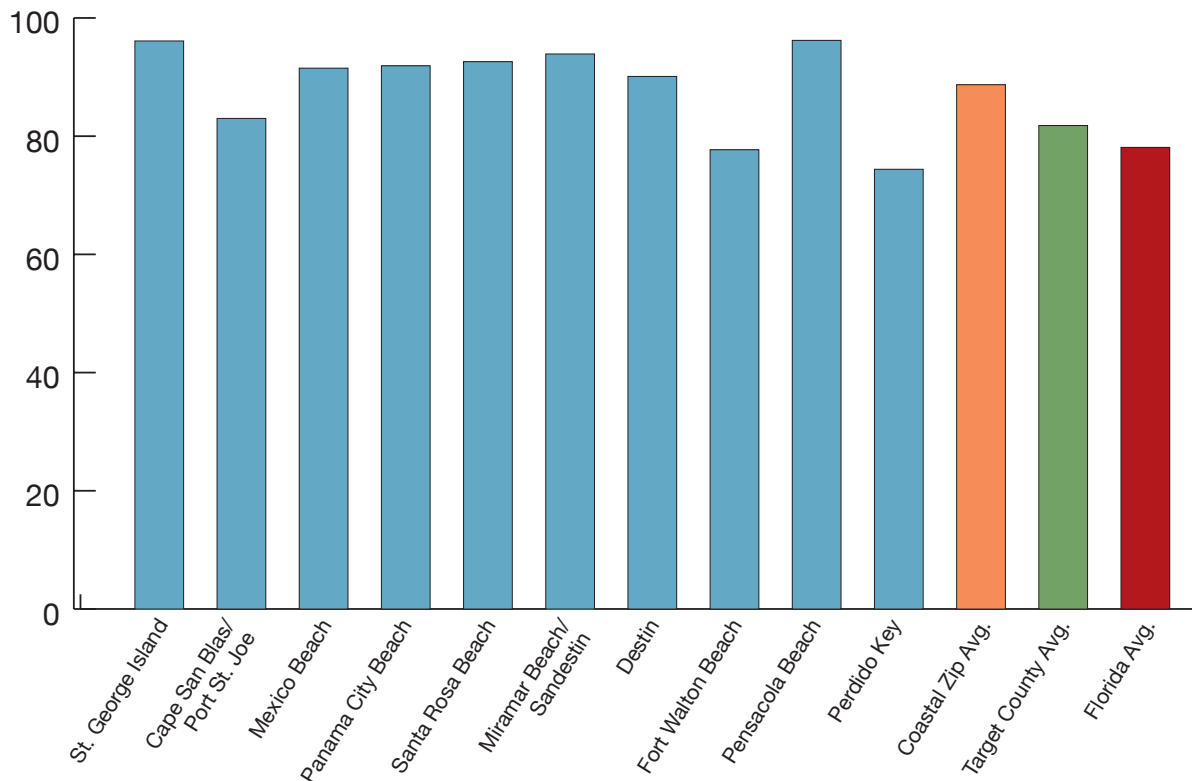
DEMOGRAPHICS

Mexico Beach has the highest median age at 54.4 years, followed by Miramar Beach/Sandestin (52.1) and Cape San Blas/Port St. Joe (49.5). At the other end of the spectrum, the median age is lowest in Panama City Beach (36.3 years) and Perdido Key (37.8 years).

Overall, 62 percent of residents in the 10 coastal areas live within family households, compared with 67.2 percent of county residents. Of the 10 coastal areas, only St. George Island has a share of family households (70.2 percent) above the county average. Consistent with their position as having the highest median ages, Mexico Beach and Miramar Beach/Sandestin also have the lowest shares of family households (54.5 percent and 56.9 percent, respectively).

Within these 10 coastal zip codes, almost nine in 10 residents – 88.7 percent – identify themselves as white alone, compared with 81.8 percent of county residents. At the same time, far fewer identify themselves as black alone – 5.5 percent in coastal areas compared with 12.8 percent of county residents. Similar portions of coastal and county residents identify as being of two or more races (2.6 percent and 2.7 percent, respectively), and throughout these target areas only very small percentages identify as Asian or Pacific Islander – together representing less than 2 percent of the population.

PERCENT OF RESIDENTS WHO IDENTIFY AS WHITE ALONE



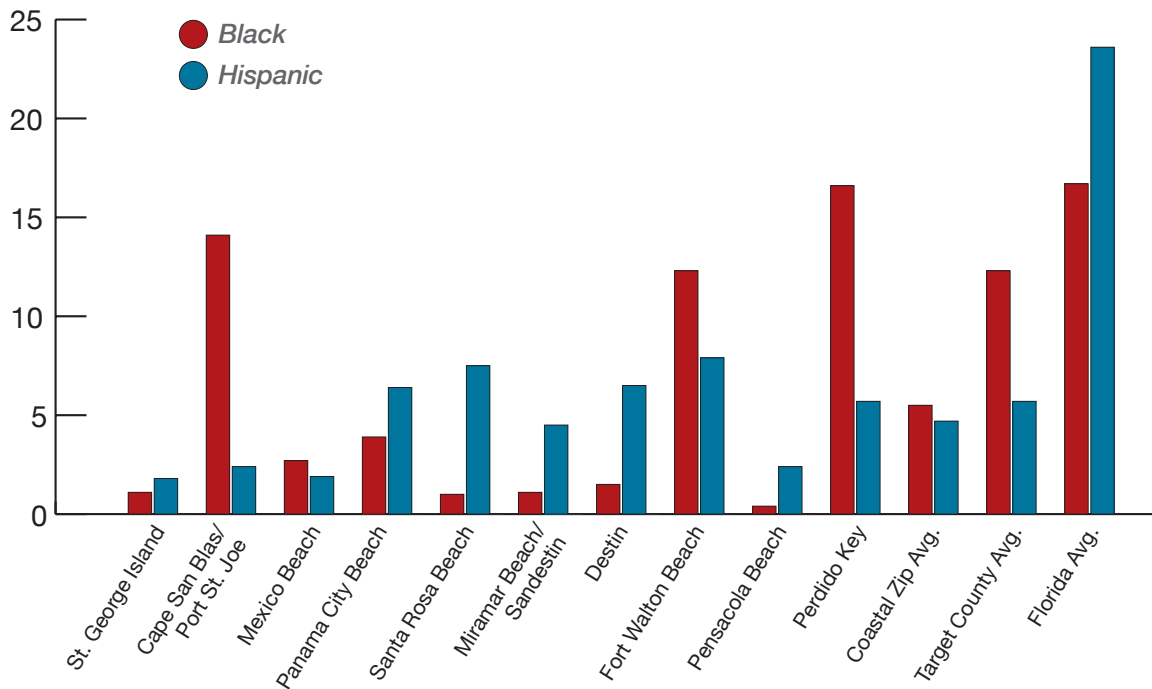


DEMOGRAPHICS

Within the 10 target counties, the most ethnically diverse coastal areas are Perdido Key, with 16.6 percent black and 5.7 percent Hispanic residents, and Fort Walton Beach, with 12.3 percent black and 7.9 percent Hispanic residents. These are the only coastal areas within the ten counties in which more than one in five residents are something other than white.

The least ethnically diverse coastal area is Pensacola Beach, with 96.2 percent of residents identifying as white alone, just 0.4 percent identifying as black and 2.4 percent as Hispanic. The demographics of St. George Island are similar, with 96.1 percent of residents identifying as white alone, 1.8 percent identifying as Hispanic and 1.1 percent identifying as black.

PERCENT OF RESIDENTS WHO IDENTIFY AS BLACK OR HISPANIC





DEMOGRAPHICS

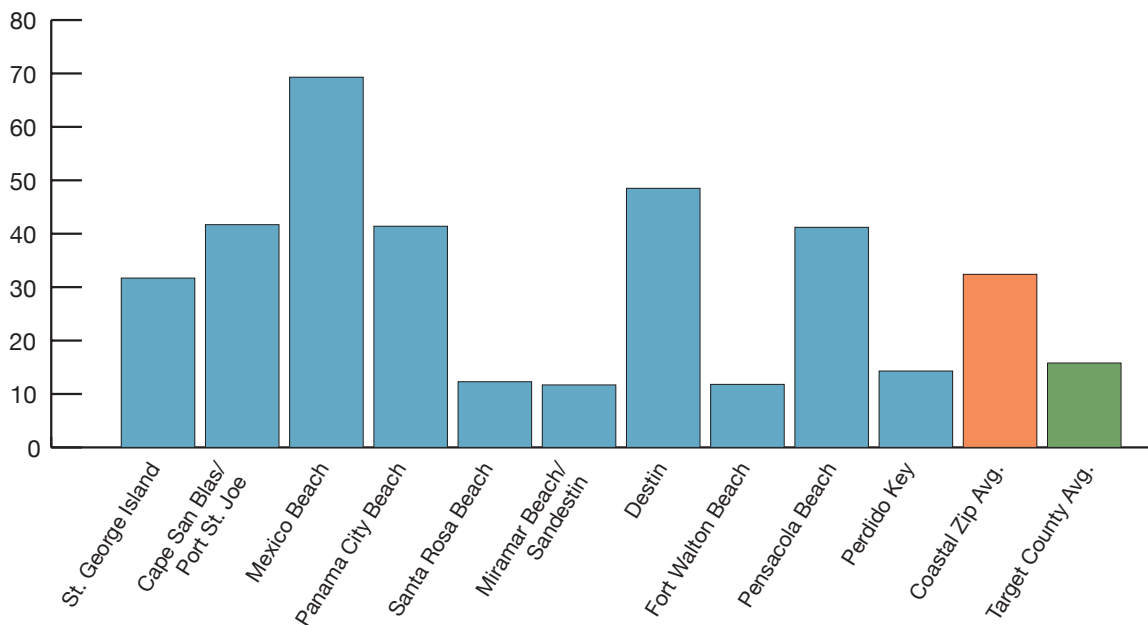
Overall, just 4.9 percent of residents in the seven target counties are foreign-born, a quarter of the rate of Florida's overall 19.3 percent. Fewer than 8 percent speak a language other than English at home, compared with 27.3 percent of residents statewide.

Coastal zip codes are also home to slightly greater ratios of veterans than their seven home counties, 5.9 percent vs. 5.1 percent. The greatest concentrations of veterans are in Miramar Beach/Sandestin (13.3 percent) and Destin (13.3 percent), followed by Santa Rosa Beach and Cape San Blas/Port St. Joe, each with veterans constituting 6.1 percent of the population. The smallest ratios of veterans in these coastal areas are found in Panama City Beach (1.9 percent) and Pensacola Beach (2.4 percent).

As would be expected in counties that feature some of the most inviting beaches to be found anywhere, housing characteristics differ significantly between the 10 coastal zip codes and their home counties. Of the 85,576 total housing units in the 10 coastal areas, just 51.5 percent are permanently occupied rather than available for rentals. This compares to 68.1 percent of housing units overall in their home counties.

Among units available for rental, the vacancy rate in coastal areas is 32.4 percent, compared with 15.8 percent in home counties. This reflects the coastal area's reputation as a destination for short-term vacation rentals rather than long-term tenants. Of the 10 coastal areas, Mexico Beach has the highest rental vacancy rate of 69.3 percent, followed by Cape San Blas/Port St. Joe at 41.7 percent and Pensacola Beach at 41.2 percent. Miramar Beach/Sandestin has the lowest rental vacancy rate at 11.7 percent, followed closely by Fort Walton Beach at 11.8 percent.

RENTAL VACANCY RATES IN 10 COASTAL AREAS





ECONOMY

› ***Economic and employment characteristics of the seven target counties***



Photo Credit: iStockphoto

In many respects, the economic characteristics of the seven target counties closely resemble those of Florida overall. Per capita income in these seven counties is \$24,079, only slightly below the Florida average of \$26,451; and the median household income between 2008 and 2012 was \$46,285 in these seven counties, compared to \$47,309 in Florida.

Home values are lower, on average, in these seven target counties (\$157,871) than in Florida overall (\$170,800). The percent of residents living below poverty in the seven counties (16 percent) is almost the same as the Florida average (15.6 percent).

Coming out of the national economic recession, between 2011 and 2012, Walton County saw the greatest increase among the seven target counties in the percentage of private nonfarm employment – an increase of 15.6

percent. During this same time period, Franklin County's employment rate increased 7.1 percent, followed by Escambia County (3.7 percent), Santa Rosa County (2.8 percent), Bay County (1.0 percent) and Okaloosa County (0.4 percent). Only Gulf County saw an overall decline (down 2.9 percent) in private nonfarm employment between 2011 and 2012.

Public employers represent a large segment of the local economies in these counties. In Franklin and Gulf counties, the Florida Department of Corrections is the largest public employer, while federal entities – including Tyndall Air Force Base in Bay County and Eglin Air Force Base in Okaloosa County – are leading public employers in their counties. The school districts in Santa Rosa and Walton counties are the largest public employers in those counties, and county government is Escambia County's largest public employer.



ECONOMY

Private employers in these seven counties show significant diversity. Health care entities are among the largest employers in many of these areas: Weems Memorial Hospital in Franklin County; Gulf Coast Medical Center and Bay Medical Center in Bay County; Sacred Heart Hospital in Walton County; Fort Walton Beach Medical Center in Okaloosa County; Baptist Health Care and Santa Rosa Medical Center in Santa Rosa County; and Baptist Health Care and Sacred Heart Health System in Escambia County.



Photo Credit: iStockphoto

Other large private employers in the seven counties include Wal-Mart (in both Bay and Santa Rosa counties); Piggly Wiggly and Fairpoint Communications (Gulf County); Leavins Seafood (Franklin County); Lowes and Mediacom (Santa Rosa County); Lockheed Martin, InDyne, L3 Communications and DRS Defense Solutions (Okaloosa County); Ascend (Escambia County); Hilton Sandestin Beach Golf Resort & Spa, Resort Quest, Publix and the Sandestin Golf and Beach Resort (Walton County); and Smurfit-Stone and Bookit.com (Bay County).

Publix®

Walmart 
Save money. Live better.

LOCKHEED MARTIN 



 **bookit**®
.com

 **Sandestin**®
Golf and Beach Resort



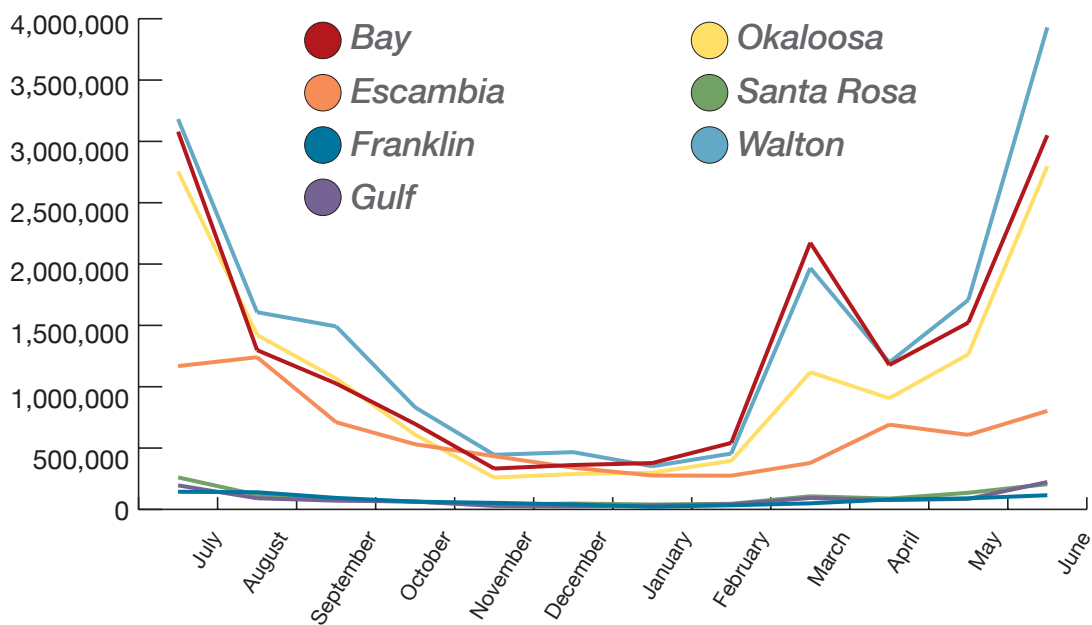
TOURISM & RECREATION

> *Tourism and recreation characteristics of the seven target counties*

One of the best indicators of tourist activity in Florida is found by evaluating Tourist Development Tax revenues. These taxes, informally referred to as “bed taxes,” are a 5 percent charge on all revenues brought in from rentals of six months or less. These figures, reported by month for each Florida county, can be used to estimate total hotel or vacation rental revenues by region.

During the 2012-2013 fiscal year, which spanned July 2012 through June 2013, a total of \$57.1 million in Tourist Development Tax revenue was generated in the seven target counties. The greatest portions of these revenues were generated in Walton (\$17.6 million), Bay (\$15.6 million) and Okaloosa (\$13.2 million) counties.

MONTHLY BED TAX TOTALS BY COUNTY FOR FY 12-13





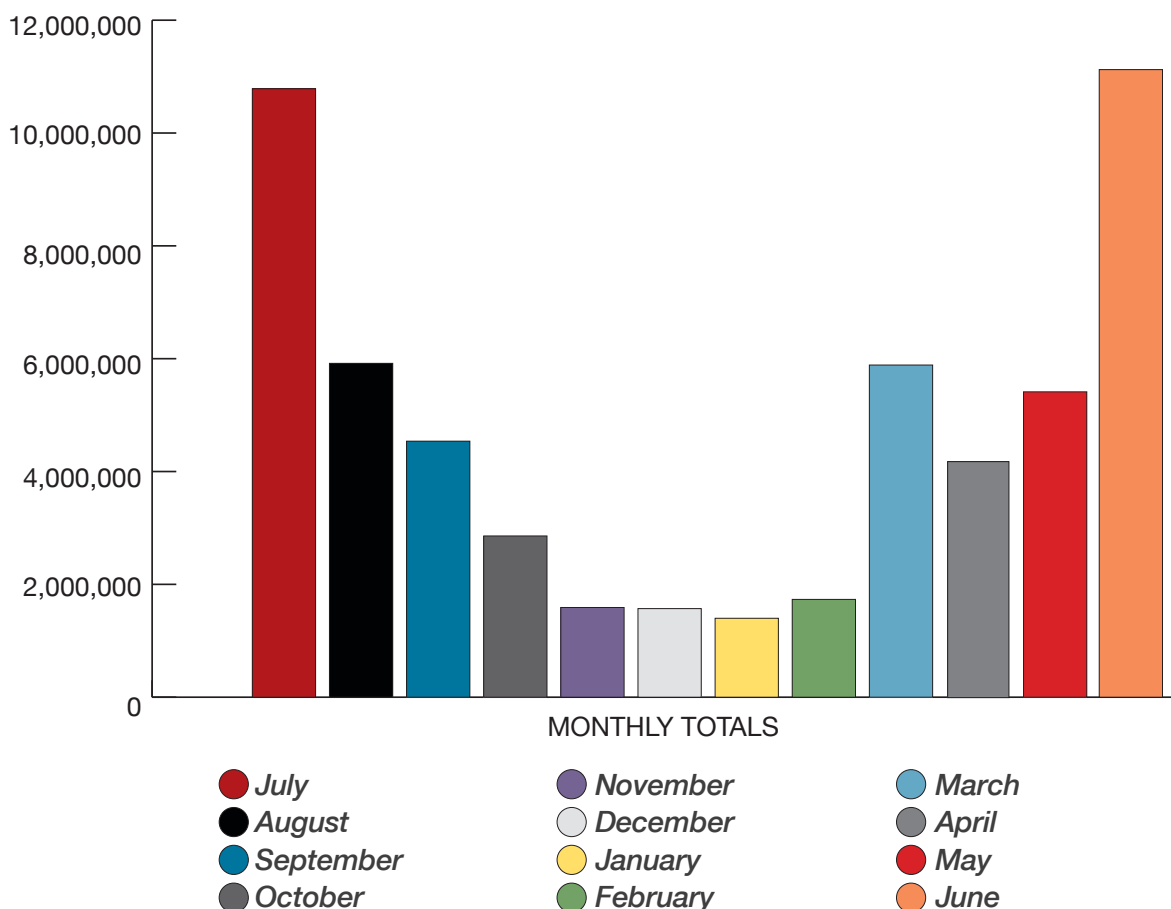
TOURISM & RECREATION

Using these figures, it can be estimated that a total of \$1.14 billion was spent on hotel or vacation rental accommodations in these seven counties during FY 12-13.

These revenues are not evenly distributed throughout the year, however. Predictably, the summer vacation months of June and July bring in substantially higher volumes of tourists in the seven counties. Only in Escambia County was a different month (August) responsible for the highest bed tax revenue during FY 12-13.

Looking at the sum of all bed tax revenues for these seven counties, by month, a small spike in tourism activity is also seen in March – likely due to Spring Break vacationers. Seasonal tourist volumes are the most dramatic in Walton, Bay and Okaloosa counties, with each following an identical pattern of large June and July bed tax revenues and a smaller March spike.

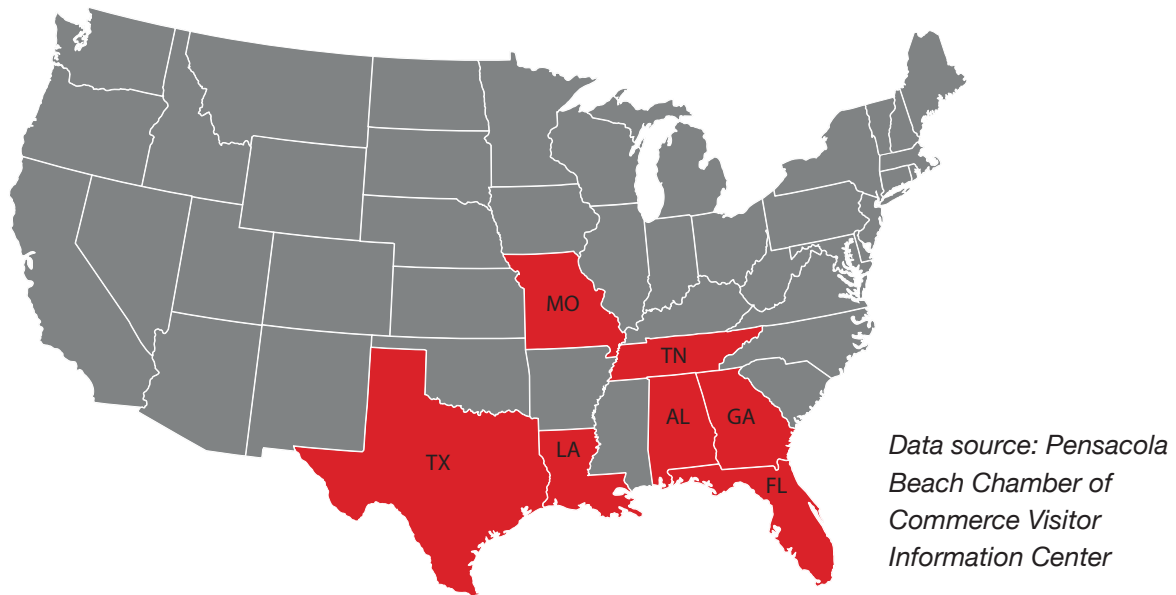
MONTHLY BED TAX REVENUES FOR ALL TARGET COUNTIES FOR FY 12-13





TOURISM & RECREATION

TOP STATES OF RESIDENCE FOR PENSACOLA BEACH VISITORS



The Pensacola Beach Chamber of Commerce maintains records regarding the number of visits by tourists to its Visitor Center. While these data do not capture the majority of those who come to the area's beaches, they do provide insights on two things. First, data confirm the highest volumes of visits that occur in the months of June and July; and secondly, provide a snapshot of the top states from where visitors come.

In 2014, the months of June and July saw the greatest volume of traffic to the Pensacola Beach Visitor Information Center, with 3,250 and 4,369 visits, respectively. May followed with 3,120 visits, August with 2,012 visits and September with 1,836 visits. These counts include all members of a family or group who entered the visitor information center.

Further, the Pensacola Beach Visitor Information Center began collecting information on tourists' states of residence in July 2014. For this month, the top five states of origin were Texas, Louisiana, Alabama, Florida and Tennessee. In August, the top five states of origin were Texas, Florida, Missouri, Louisiana and Alabama; and in September, Texas led the list again, followed by Tennessee, Florida, Georgia and Louisiana. The proximity of these states to the Florida panhandle suggests visitors are likely to drive rather than fly, and also suggests that many may have been visiting panhandle beaches for some time or could be familiar with sea turtle stewardship from experiences on other Gulf beaches.

While we do not have other hard data regarding tourists' demographics or key reasons for visiting target counties, we will incorporate these questions into our research phase.

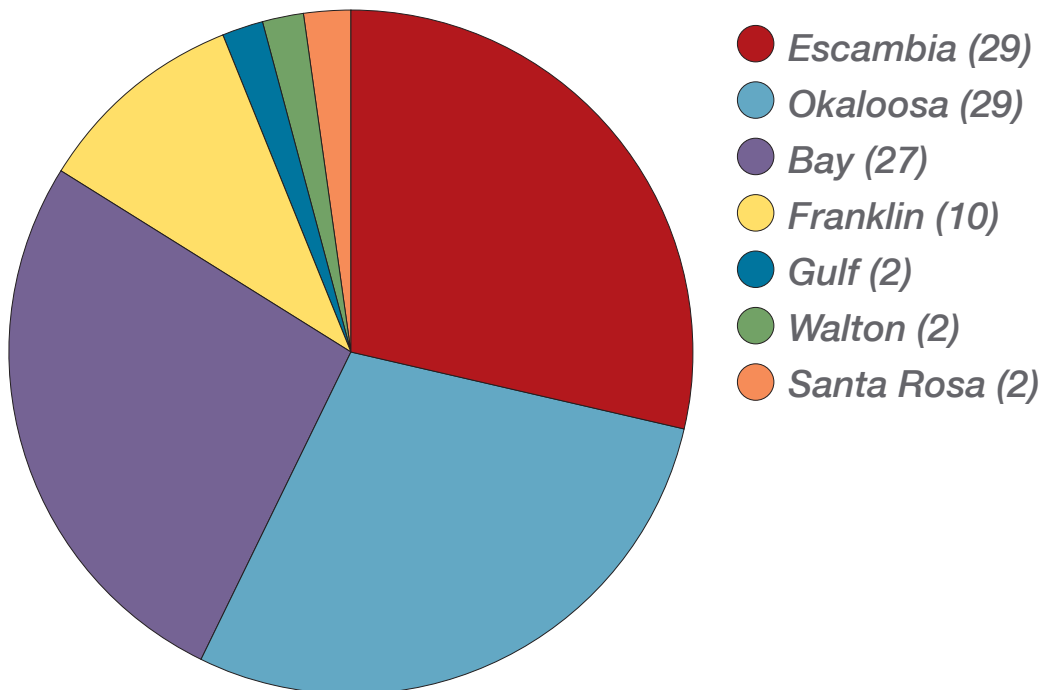


TOURISM & RECREATION

Coastal recreation is certainly a significant aspect of tourism, and of the lives of residents, in these counties. A total of 101 saltwater marinas are spread across these seven counties, providing at least 4,902 saltwater slips for fishermen and boating enthusiasts. The counties also feature 76 saltwater piers, providing additional recreational opportunities for residents and visitors. The greatest numbers of saltwater marinas are found in Escambia and Okaloosa counties, with 29 each, followed by Bay County with 27 and Franklin County with 10.

Together, almost 80,000 recreational boats were registered in the seven target counties in 2009, the most recent year for which data are available. Bay County was home to the greatest number of recreational boat registrations with 19,181, followed by 17,967 in Okaloosa County; 17,100 in Escambia County; and 14,716 in Santa Rosa County. Bay County is also home to the largest number of saltwater piers (27) followed by Okaloosa's 17, and Santa Rosa and Escambia counties, with 11 each.

NUMBER OF SALTWATER MARINAS BY COUNTY



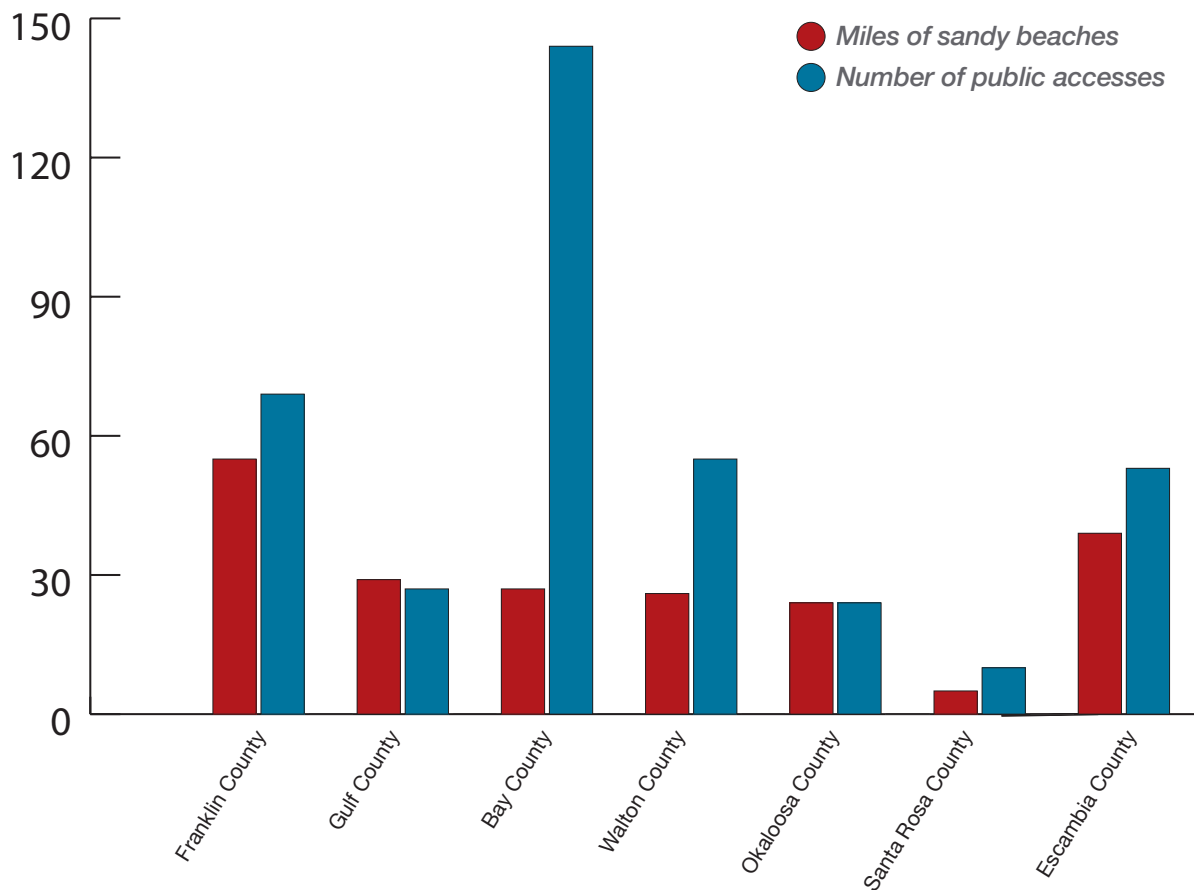


GEOGRAPHY

> *Geographic characteristics of the seven target counties*

The seven target counties in this public awareness campaign cover a total of 5,493 square miles, about 9 percent of Florida's total land mass. Population density varies greatly among the seven counties, from a high of 453.4 persons per square mile in Escambia County to a low of just 21.6 persons per square mile in Franklin County.

MILES OF SANDY BEACHES AND PUBLIC BEACH ACCESSSES BY COUNTY



These counties boast a total of 205 miles of sandy beaches, featuring a reported 382 public beach accesses. This means the public has almost two points of entry to choose from for every mile of sandy beach along the area's coastline.



GEOGRAPHY

By far, the greatest concentration of public beach access sites is in Bay County, where there are 144 public accesses for 27 miles of sandy beach – more than five public accesses per beach mile.

Overall, Franklin County has the largest stretch of sandy beaches (55 miles), followed by Escambia (39 miles), Gulf (29 miles), Bay (27 miles), Walton (26 miles), Okaloosa (24 miles) and Santa Rosa (5 miles).

Inland from beachfront geography, these counties also feature substantial bays and inlets, federal lands and state parks. The seven counties contain an estimated 2.6 million acres of federal lands, including the Gulf Islands National Seashore, the Apalachicola National Estuarine Research Reserve, the Apalachicola National Forest, the St. Vincent Island National Wildlife Refuge, Tyndall and Eglin Air Force bases, and other federal properties.

Even greater numbers of state parks and lands can be found in these seven counties, including Bald Point State Park, St. George Island State Park and Cape St. George State Reserve in Franklin County; St. Joseph Peninsula State Park in Gulf County; Shell Island in Bay County; Grayton Beach State Park in Walton County; Rocky Bayou Aquatic Preserve in Okaloosa County; and Perdido Key State Park in Escambia County.



Photo Credit: iStockphoto



REGULATIONS

› ***Relevant beach and turtle regulations***

Some counties and cities have enacted regulations specifically to protect sea turtles. These include lighting ordinances, beach bonfire ordinances and sea turtle harassment laws.

Lighting ordinances

Six of the seven counties have enacted beach lighting ordinances for the protection of sea turtles: Franklin, Gulf, Bay, Walton, Escambia and Santa Rosa. These counties designate the period from May 1 through October 31 as turtle nesting season. Okaloosa County has not adopted a lighting ordinance; however, the City of Destin within Okaloosa County has done so.

County lighting ordinances are substantially similar, with only a few variations in language among them. All of the ordinances include the provision that points of light should not be visible from the beach. Each of the five county ordinances includes the recommendations that, in order to comply with the ordinance, property owners should install tinted glass on all windows and glass doors within the line of sight from the beach; should install window treatments to shield interior lights from the beach at night during marine turtle nesting; should rearrange lamps and other moveable light fixtures away from windows; and should turn off unnecessary lights.

In Franklin County, bug lights not exceeding 25 watts may be used to replace traditional light bulbs. Turtle-safe lighting in Bay and Walton counties includes 11-watt compact fluorescent lamps, bug lamps and low-pressure sodium vapor lamps. Gulf County requires the lowest wattage bulbs possible for the specific application to be used. Santa Rosa County has a general provision that artificial lighting should be modified to limit light intensity.

Walton, Santa Rosa, Gulf and Franklin counties all have provisions specific to dune lighting. No areas seaward of the dunes should be directly, indirectly or cumulatively illuminated. In Walton County, dune walkway lighting is permitted only if the light source turns on when the person enters the walkway and turns off immediately after the person exits the walkway.

Santa Rosa County has a specific provision that all lighting unnecessary to human safety should be turned off after 9:00 p.m. between May 1 and October 31, or be fitted with an approved hood. This includes privately- and publicly-owned lights, as well as all dune lighting.

In parking areas, low-level lighting should be used, as well as hoods or ground-level barriers. Franklin County specifically states that lights in parking lots must not be set on a base higher than 48 inches from the ground.

Walton County is the only county in the area that appears to expressly require property owners to inform visitors about beach lighting rules. Any property owners in the county who remit Tourist Development Council Bed Taxes within a Wildlife Conservation Zone are required to post standardized signs at conspicuous locations within common areas of their property, and are to provide printed information notifying renters of lighting regulations. Walton County provides these printed materials at no cost to the owner. Walton County also reports violations of these ordinances. In FY 13-14, county code enforcement officers cited 191 violations of wildlife lighting rules. Of these, about half were issued during turtle nesting season.



REGULATIONS

The cities of Destin, Mexico Beach and Panama City Beach have adopted city ordinances that comply with the above conditions. As mentioned above, the City of Destin differs from Okaloosa County, which has not adopted any lighting ordinances. Destin's regulation approves lighting that is under 50 watts as acceptable during the turtle nesting season, as long as it is not seen from the beach.

Beach bonfire ordinances

Beach bonfire ordinances exist in Walton, Okaloosa, Santa Rosa and Escambia counties. Walton and Santa Rosa counties follow South Walton Ordinance 2010-09, which provides that bonfires on the beach are allowed only with the purchase of a permit. Okaloosa County Ordinance 79-41 states that bonfires are not allowed on the beach. Escambia County Ordinance section 74-36 (4) states that no fires are allowed on the beaches in Escambia County. Franklin, Gulf and Bay counties do not appear to have adopted beach bonfire ordinances.

During FY 13-14 in Walton County, 162 citations were issued for violations of the beach bonfire ordinance. Of these, more than half were issued during the peak of turtle nesting season – 50 in July and 42 in August.

Sea turtle harassment laws

The seven target counties do not appear to have enacted their own ordinances related to sea turtle harassment, but rather follow the laws set forth by the State of Florida and the federal government.

- › The U.S. Endangered Species Act of 1973 states that “no person may take, harass, harm, pursue, hunt, shoot, wound, kill, trap, or capture any marine turtle, turtle nest, and/or eggs, or attempt to engage in any such conduct.”
- › Chapter 370, Florida Statutes, states that “no person may take, possess, disturb, mutilate, destroy, cause to be destroyed, sell, offer for sale, transfer, molest, or harass any marine turtle or its nest or eggs at any time.”

Both state and federal laws threaten fines and imprisonment for violations.



DATA SOURCES

- > Apalachicola Bay Chamber of Commerce, St. George Island:
http://www.apalachicolabay.org/index.cfm/pageid/31/St_George_Island/
- > Cape San Blas Visitor Information:
<http://www.capesanblas.com/cape-san-blas-visitor-information.cf>
- > Escambia County Code of Ordinances:
http://escambiacounty-fl.eregulations.us/code/coor/coor_pti_ch74_artii_sec74-36/
- > Florida Department of Environmental Protection, Florida Guide to Coastal Accesses:
<http://www.dep.state.fl.us/cmp/beachaccess/>
- > Florida Department of Revenue, Local Tax Receipts by County:
http://dor.myflorida.com/dor/taxes/colls_from_7_2003.html#local
- > Florida Fish and Wildlife Conservation Commission. Fish and Wildlife Research Institute. Sea Turtles: Nesting. <http://myfwc.com/research/wildlife/sea-turtles/nesting/>
- > Florida Fish and Wildlife Conservation Commission. Living With Wildlife: Before you Drive on the Beach... <http://myfwc.com/conservation/you-conserve/wildlife/beach-driving/>
- > Florida Fish and Wildlife Conservation Commission, Sea Turtle Protection Ordinances:
<http://myfwc.com/conservation/you-conserve/lighting/ordinances/>
- > Florida's Great Northwest, County Information:
<http://www.floridasgreatnorthwest.com/regional-overview/county-information>
- > Greater Pensacola Chamber of Commerce, Economic Development:
<http://www.choosegreaterpensacola.com/Business-Location-Expansion/Leading-Employers.aspx>
- > Gulf County Chamber of Commerce: <http://www.gulfchamber.org/>
- > Okaloosa County Beach Regulations:
<http://www.ecvr.com/blog/2011/01/okaloosa-county-beach-regulations>
- > Panama City Beach Chamber of Commerce: <http://www.pcbeach.org/community/news.php>



DATA SOURCES

- Pensacola Beach Chamber of Commerce, Visitor Information Center. Telephone conversation on December 11, 2014.
- Santa Rosa Chamber of Commerce: <http://www.santarosachamber.com/>
- Santa Rosa Island Authority. Telephone conversation on December 11, 2014.
- U.S. Census American Community Survey: <http://www.census.gov/acs/www/>
- U.S. Census Fact Finder: <http://factfinder2.census.gov/faces/nav/jsf/pages/index.xhtml>
- U.S. Census Quick Facts: <http://quickfacts.census.gov/qfd/states/12000lk.html>
- U.S. Department of Labor, Bureau of Labor Statistics: <http://www.bls.gov/cew/>
- U.S. Department of Labor, Bureau of Labor Statistics: http://www.bls.gov/cps/occupation_age.htm
- U.S. Fish & Wildlife Service, 2011 National Survey of Fishing, Hunting and Wildlife-Associated Recreation: Florida. <https://www.census.gov/prod/2013pubs/fhw11-fl.pdf>
- Walton County City Ordinances: <http://www.co.walton.fl.us/DocumentCenter/Home/View/1366>
- Walton County Tourist Development Council, Annual Report FY 2014: <http://www.visitsouthwalton.org/annual-report>



APPENDIX: RAW DATA

PEOPLE - BY COUNTY

	Franklin County	Gulf County	Bay County	Walton County	Okaloosa County	Santa Rosa County	Escambia County	COUNTY TOTAL	COUNTY AVERAGE	STATE OF FLORIDA AVERAGE
Population (2013)	11,598	15,829	174,987	59,807	193,811	161,096	305,817	922,945	131,849	19,552,860
Population (2010)	11,549	15,863	168,852	55,043	180,822	151,372	305,817	889,318	127,045	18,801,310
Pop. % change (2010 to 2013)	0.4	-0.2	3.6	8.7	0.1	0.1	0.0	n/a	1.8	4.0
Median age	43.4	43.1	40.0	42.1	38.3	39.2	37.6	n/a	40.5	40.8
% <age 5	4.4	4.3	6.2	5.5	6.7	5.8	6.1	n/a	5.6	5.5
% < age 18	16.6	15.7	21.5	20.4	22.2	22.8	21.0	n/a	20.0	20.6
% > age 65	19.8	17.4	15.9	18.1	14.7	14.0	15.5	n/a	16.5	18.7
% female	42.7	40.0	50.4	49.2	49.2	49.0	50.3	n/a	47.3	51.1
% White alone	82.9	78.2	82.6	89.5	82.1	87.3	70.1	n/a	81.8	78.1
% Black alone	14.2	19.0	11.2	5.9	9.9	6.5	22.8	n/a	12.8	16.7
% Asian alone	0.6	0.4	2.3	1.0	3.2	2.1	3.0	n/a	1.8	2.7
% Native Hawaiian/Pacific Islander alone	0.1	0.0	0.1	0.2	0.3	0.2	0.2	n/a	0.2	0.1
% Hispanic or Latino	4.9	4.8	5.4	6.2	8.3	5.1	5.2	n/a	5.7	23.6
% Two or more races	1.6	1.8	3.0	2.4	3.9	3.0	3.0	n/a	2.7	1.9
% Living in same house >1 year	78.3	84.4	78.6	80.6	80.0	81.6	80.3	n/a	80.5	83.7
% Foreign born (2008-2012)	4.1	3.7	4.8	4.6	7.1	4.6	5.7	n/a	4.9	19.3
% Language other than English spoken at home > age 5	8.5	4.8	6.3	7.9	10.1	7.0	8.2	n/a	7.5	27.3
% High school graduate or higher > age 25	79.2	78.3	87.4	85.7	91.2	89.3	87.1	n/a	85.5	85.8
% Bachelor's degree or higher > age 25	15.2	13.8	21.3	24.2	27.2	25.8	23.2	n/a	21.5	26.2
% Veterans	4.0	5.0	6.2	7.1	5.4	3.5	4.3	n/a	5.1	5.0



APPENDIX: RAW DATA

PEOPLE - BY CITY / COASTAL ZIP CODE

	St. George Island	Cape San Blas/Port St. Joe	Mexico Beach	Panama City Beach	Santa Rosa Beach	Miramar Beach/San Destin	Destin	Fort Walton Beach	Pensacola Beach	Perdido Key	CITY AVERAGE	COUNTY AVERAGE
County	Franklin	Gulf	Bay	Bay	Walton	Walton	Walton	Okaloosa	Escambia	Escambia	n/a	n/a
Coastal zip code	32328	32456	32410	32407	32459	32550	32541	32548	32561	32507	n/a	n/a
Population (2010)	3,149	6,966	740	9,347	11,457	5,867	12,305	19,507	7,899	28,996	10,623	127,045
Median age	44.5	49.5	54.4	36.3	40.8	52.1	41.8	42.8	48.2	37.8	44.8	40.5
% < age 5	6.6	4.6	2.0	5.5	6.2	4.2	5.3	5.0	3.0	7.4	5.0	5.6
% < age 18	20.5	18.2	10.9	8.3	19.8	13.9	18.6	19.1	19.8	23.1	17.2	20.0
% > age 65	19.6	24.1	29.7	13.1	13.4	26.2	15.3	18.8	19.7	13.8	19.4	16.5
% Female	48.4	51.7	51.2	49.3	50.6	51.6	49.3	50.5	51.2	50	50.4	47.3
% White alone	96.1	83	91.5	91.9	92.6	93.9	90.1	77.7	96.2	74.4	88.7	81.8
% Black alone	1.1	14.1	2.7	3.9	1.0	1.1	1.5	12.3	0.4	16.6	5.5	12.8
% Asian alone	0.1	0.3	0.9	3.2	1.1	1.7	2.1	3.2	1.3	2.6	1.7	1.8
% Native Hawaiian/ Pacific Islander alone	0	0	0	0.1	0.2	0	0.1	0.3	0	0.2	0.1	0.2
% Hispanic or Latino	1.8	2.4	1.9	6.4	7.5	4.5	6.5	7.9	2.4	5.7	4.7	5.7
% Two or more races	1.6	1.8	3.6	3.4	2.2	1.4	3.0	3.7	1.1	3.7	2.6	2.7
% Veterans	4.2	6.1	2.6	1.9	6.1	13.3	13.3	5.8	2.4	3.2	5.9	5.1



APPENDIX: RAW DATA

HOUSEHOLD - BY COUNTY (2013 DATA UNLESS OTHERWISE SPECIFIED)

	Franklin County	Gulf County	Bay County	Walton County	Okaloosa County	Santa Rosa County	Escambia County	STATE OF FLORIDA	COUNTY AVERAGE
Total Housing Units	8,547	9,084	99,575	46,534	93,946	66,203	137,679	9,047,612	65,938
% Occupied housing units	51.8	59.0	69.2	50.0	78.1	87.3	81.4	81.7	68.1
% Vacant housing units	48.2	40.9	30.8	50.0	21.9	12.7	18.6	18.3	31.8
Homeownership rate (%)	66.6	72.8	63.8	72.3	66.3	75.2	64.1	68.1	68.9
Rental vacancy rate (%)	14.5	23.2	23.0	7.1	18.8	12.5	12.5	11.4	15.8
% Housing units in multi-unit structures	15.3	11.9	30.8	26.4	26.5	11.2	23.9	30.1	20.9
% Owner-occupied housing units	66.6	72.8	63.8	72.3	66.3	75.2	64.1	65.4	68.9
% Renter occupied housing units	33.4	27.2	36.2	27.7	33.7	24.8	35.9	34.6	31.1
Median value of owner-occupied housing units	\$159,800	\$126,300	\$163,000	\$164,200	\$188,200	\$166,300	\$137,300	\$170,800	\$157,871
Total households	4,479	5,368	68,862	22,519	72,300	56,475	112,012	7,147,013	48,859
Average persons per household	2.14	2.49	2.39	2.37	2.47	2.65	2.51	2.58	2.43
% Family households	67.6	69.1	63.5	65.1	67.5	74.0	63.6	63.6	67.2
Per capita income (2012)	\$20,546	\$17,975	\$24,859	\$26,454	\$28,040	\$27,282	\$23,396	\$26,451	\$24,079
Median household income (2008-2012)	\$37,428	\$39,535	\$47,364	\$44,254	\$54,118	\$57,491	\$43,806	\$47,309	\$46,285
% below poverty	22.2	18.8	13.3	16.4	12.5	11.1	17.8	15.6	16.0



APPENDIX: RAW DATA

HOUSEHOLD - BY CITY / COASTAL ZIP CODE

	St. George Island	Cape San Blas / Port St. Joe	Mexico Beach	Panama City Beach	Santa Rosa Beach	Miramar Beach / San Destin	Destin	Fort Walton Beach	Pensacola Beach	Perdido Key	CITY AVERAGE	COUNTY AVERAGE
Total Housing Units (2013)	1,286	3,048	1,309	8,118	11,678	12,739	14,937	9,592	5,898	16,971	8,558	65,938
% Occupied housing units	41.4	52.9	50	50.5	41.4	24.7	44.7	87.5	57.1	64.6	51.5	68.1
% Vacant housing units	58.6	47.1	69.3	49.5	58.6	75.3	55.3	12.5	42.9	35.4	50.5	31.8
Rental vacancy rate (%)	31.7	41.7	69.3	41.4	12.3	11.7	48.5	11.8	41.2	14.3	32.4	15.8
% Owner- occupied housing units	79.5	71.7	54.5	47.8	68.2	68.4	70.9	62.4	73.8	64.1	66.1	68.9
% Renter occupied housing units	20.5	28.3	45.5	52.2	31.8	31.6	29.1	37.6	26.2	35.9	33.9	31.1
Average persons per household	2.4	2.23	1.88	2.26	2.35	2.03	2.37	2.26	2.29	2.38	2.2	2.43
% Family households	70.2	65.1	54.5	57.2	63	56.9	65.0	59.6	65.8	62.3	62.0	67.2



APPENDIX: RAW DATA

EMPLOYMENT - BY COUNTY

	Franklin County	Gulf County	Bay County	Walton County	Okaloosa County	Santa Rosa County	Escambia County
Private nonfarm establishments (2012)	301	286	4,352	1,816	5,001	2,464	6,545
Private nonfarm employment (2012)	2,198	1,970	56,547	17,901	58,748	21,926	99,796
Private nonfarm employment % change (2011-2012)	7.1	-2.9	1.0	15.6	0.4	2.8	3.7
Nonemployer establishments (2012)	1,305	1,047	12,311	6,291	13,891	10,229	19,189
Largest employer (public)	- Florida Department of Corrections	- Florida Department of Corrections	- Tyndall Air Force Base	- Walton County School Board	- US Department of Defense - Eglin Air Force Base	- Santa Rosa County School District	- County Government
Largest employer (private)	- Leavins Seafood - Weems Memorial Hospital	- Fairpoint Comm's. - Piggly Wiggly	- Wal-Mart - Smurfit-Stone - Gulf Coast Medical Center (With HCA-private) - Bay Medical - Book It.com	- Hilton Sandestin Beach, Golf Resort & Spa - Resort Quest - Pulix - Sandestin Golf and Beach Resort - Sacred Heart Hospital - Emerald Coast	- Lockheed Martin - InDyne, Inc. - L3 Comm's. - Fort Walton Beach Medical Center - DRS Defense Solutions	- Wal-Mart - Lowes - Mediacom - Santa Rosa Medical Center - Baptist Health Care	- Ascend - Baptist Health Care - Sacred Heart Health System - Gulf Power



APPENDIX: RAW DATA

TOURISM & RECREATION - BY COUNTY

	Franklin County	Gulf County	Bay County	Walton County	Okaloosa County	Santa Rosa County	Escambia County	COUNTY TOTAL
Tourist development taxes brought in (2013) ("bed tax" is 5% charge on the revenue from rentals of six months or less)	\$929,299	\$1,028,291	\$15,637,360	\$17,633,929	\$13,192,005	\$1,226,857	\$7,454,174	\$57.1 million
Hotel/rental revenues (2013)	\$18,585,980	\$20,565,820	\$312,747,200	\$352,678,580	\$263,840,100	\$24,537,140	\$149,083,480	\$1.14 billion
Top 2 months with largest hotel revenues (2013)	1. July 2. August	1. June 2. July	1. July 2. June	1. June 2. July	1. June 2. July	1. July 2. June	1. August 2. July	
Number of saltwater marinas	10	2	27	2	29	2	29	101
Number of saltwater slips	335	120	1,602	103	1,205	62	1,475	4,902
Number of saltwater piers	8	1	27	1	17	11	11	76
Number of recreational boats registered by county (2009)	2,630	2,862	19,181	5,518	17,967	14,716	17,100	79,974



APPENDIX: RAW DATA

TOURISM - BED TAX TOTALS PER MONTH BY COUNTY (\$)

County	July	August	September	October	November	December	January	February	March	April	May	June	Total 2012-13
Bay	3,079,218	1,298,265	1,026,203	696,350	332,873	361,735	377,798	541,786	2,173,927	1,176,872	1,522,314	3,050,020	15,637,360
Escambia	1,168,527	1,240,547	710,431	531,066	433,598	339,864	276,156	274,606	378,416	690,989	607,405	802,569	7,454,174
Franklin	143,702	139,794	93,793	62,905	53,395	40,294	21,496	33,544	49,314	80,475	90,144	115,442	924,299
Gulf	195,911	90,879	71,201	64,294	28,441	25,268	32,859	41,825	93,111	75,833	85,793	222,876	1,028,291
Okaloosa	2,755,052	1,421,409	1,067,150	609,091	259,607	288,498	298,995	395,790	1,118,616	905,964	1,264,607	2,797,226	13,182,005
Santa Rosa	260,968	119,152	77,283	62,516	36,890	47,883	39,995	45,631	106,741	88,199	135,554	206,045	1,226,857
Walton	3,181,835	1,607,222	1,492,009	831,869	445,093	466,558	351,501	455,307	1,967,419	1,198,460	1,707,055	3,929,600	17,633,929
Monthly Totals	10,785,213	5,917,268	4,538,070	2,858,091	1,589,897	1,570,100	1,398,800	1,788,489	5,887,544	4,216,792	5,412,872	11,123,778	57,086,915

GEOGRAPHY - BY COUNTY

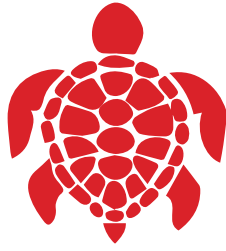
	Franklin County	Gulf County	Bay County	Walton County	Okaloosa County	Santa Rosa County	Escambia County	COUNTY TOTAL
Land area in square miles	535	564	758	1,038	930	1,012	656	5,493
Persons per square mile	21.6	28.1	222.6	53.0	194.4	149.6	453.4	1,123
Miles of sandy beaches	55	29	27	26	24	5	39	205
Number of public accesses	69	27	144	55	24	10	53	382
Acres of federal lands	826,998	13,240	28,000	529,998	536,849	530,215	161,550	2,626,850



APPENDIX: RAW DATA

PARKS & LANDS - BY COUNTY

	Franklin County	Gulf County	Bay County	Walton County	Okaloosa County	Santa Rosa County	Escambia County
List of Bays and Inlets	Alligator, Apalachicola, Big, Blounts, East & Little Ochlockonee bays, East & West bayous, Rattlesnake Cove, St. George & St. Vincent sounds	Indian Lagoon, St. Joseph Bay	East, North, West & St. Andrew bays, St. Andrews Sound, Wild Goose Lagoon, Watson Bayou, Deer Point Lake	Choctawhatchee Bay, Grassy Cove, Basin Bayou, Bunker Cove, Jolly Bay, Alaqua Bayou	Choctawhatchee Bay, East Pass, Boggy, Cinco, Garnier, Hogtown, La Grange & Rocky bayous, Moreno Point	Escambia, East & Blackwater bays, Santa Rosa Sound, Indian & Trout bayous	Bayou Chico, Bayou Garcon, Big Lagoon, Escambia, Pensacola, Perdido & Tarklin Bays & Tarklin Bayou
List of State Parks & Lands	Bald Point Island State Park, John Gorrie Museum State Park, Orman House State Park, St. George Island State Park, Alligator Harbor State Aquatic Preserve, Apalachicola Bay Aquatic Preserve, State Aquatic Preserve, Cape St. George State Reserve, Tate's Hell State Forest (Liberty), Apalachicola River Wildlife & Environmental Area (Gulf)	Constitution Convention Museum State Park, St. Joseph Peninsula State Park, Apalachicola Bay State Aquatic Preserve (Franklin), St. Joseph Bay State Aquatic Preserve, St. Joseph Bay State Buffer Preserve	Camp Helen State Park, St. Andrews State Park/Shell Island, St. Andrews State Aquatic Preserve, Pine Log State Forest (Washington)	Deer Lake State Park, Eden Gardens State Park, Grayton Beach State Parks, Ponce de Leon Springs State Park, Topsail Hill Preserve State Park, Point Washington State Forest	Rocky Bayou State Park, Henderson State Park, Rocky Bayou Aquatic Preserve, Blackwater River State Forest, Yellow River Water Management Area	Blackwater River State Park, Yellow River Marsh Preserve State Park, Yellow River Marsh State Aquatic Preserve, Blackwater River State Forest	Big Lagoon State Park, Perdido Key State Park, Tarklin Bayou Preserve State Park, Fort Pickens Aquatic Preserve
List of Federal Lands	Apalachicola National Estuarine Research Reserve, Apalachicola National Forest (Leon, Liberty & Wakulla), St. Vincent Island National Wildlife Refuge	Eglin Air Force Cape San Blas, St. Vincent National Wildlife Refuge (Franklin)	Tyndall Air Force Base (Santa Rosa, Okaloosa, Walton)	Pensacola Beach, Eglin Air Force Base (Santa Rosa, Okaloosa)	Gulf Islands National Seashore, Choctawhatchee National Forest, Eglin Air Force Base, Hulbert Field Air Force Base	Gulf Islands National Seashore, Eglin Air Force Base, Choctawhatchee National Forest	Gulf Islands National Seashore, Pensacola Beach



114 S. Duval Street
Tallahassee, FL 32301
T: 850.222.1996 | F: 850.224.2882

SACHSMEDIA
G R O U P